

FIG. 1

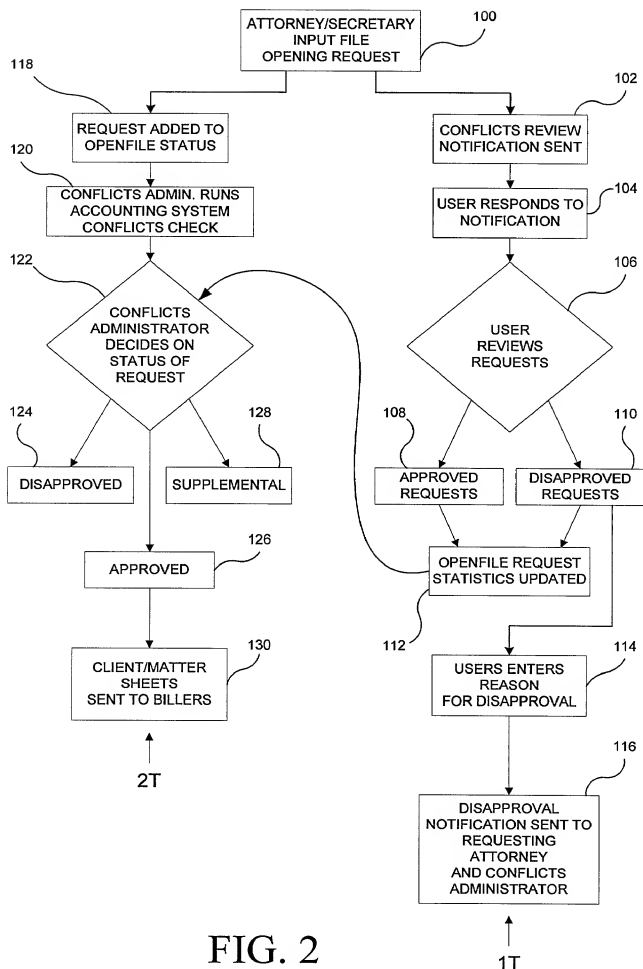


FIG. 2

New Conflict Check

Client and Case Information	
Client:	<input checked="" type="radio"/> New Client - Provide Name <input type="radio"/> Existing - Provide Client's 6 digit Code <input type="text"/> <input type="button" value="Validate"/>
Matter Name:	<input type="text"/>
Description:	<input type="text"/>

List any other firm clients involved in this matter
(fill in the client code below then click "add associated client")

Client Code:	<input type="text"/>	<input type="button" value="Add Associated Client"/>
Client Name:	<input type="text"/>	
Client Code:	<input type="text"/>	

Report Potential Conflict to:	
Whistle:	None <input type="button" value="v"/>

Your parties will be displayed on the printable form once you click "Submit This Form"

This form created by Pare, Shana on Thursday, June 07, 2001 07:24:59 US/Central



FIG. 3



Related Parties

List Adverse/Related Parties Below

First Name

Middle Name

Last Name

Last 0 of 0 Parties

Party Status

SELECT A STATUS-PLEASE!

Relationship

Adverse

Add Party

Name	Party Status	Relationship
------	--------------	--------------

Display All

Save for Later

Done

Created by Pare, Shana



FIG. 4

Related Parties

Created By: Schwabe, Janet A.

1 Parties

Name	Party Status	Relationship	Disregard
John A. Jones	Creditor	Adverse	<ul style="list-style-type: none">• NoYes

Add More Parties

Continue With Conflict Request

FIG. 5



New Client

Setup Form Again

New Client Information

Client Full Name
Client Short Name
(40 char max)
Main Address Line 1
Main Address Line 2
Main Address Line 3
Main Address Line 4
City State Zip
Telephone
Fax

Billing Information

Opening Attorney Billing Attorney Responsible Attorney Assigned Attorney
(must be in the practice area performing the service)

Office Dept Task Based Billing? ☒ No ☐ Yes
Client Category
Client Group
Industry Classification
Num. of Anticipated Matters
Bill Consolidation ☒ No ☐ Yes
Retainer Amount Requested
Date Retainer Received
Collection Contact
Name
Title
Telephone No.

Created by Pare, Shana on Monday, July 30, 2001 16:42:29 US/Central

Comments to Billing Manager

Submit This Form

FIG. 6



Conflict Check Association

Please choose a conflict to associate with this new client, by clicking the corresponding Conflict ID :

Display: "My Conflicts" ☒ Refresh


3 (conflicts)

Conflict ID	Client Name	Matter Name	Creator	Date
<u>27268</u>	City of San Antonio	City of San Antonio	JAS2	Friday, June 08, 2001 09:42:43 US/Central
<u>27464</u>	Palacio Del Rio, Inc.	Palacio Del Rio	JAS2	Wednesday, June 13, 2001 15:50:32 US/Central
<u>27694</u>	Sullivan Sales Promotion Advertising, Inc.	Sullivan	JAS2	Wednesday, June 20, 2001 11:02:28 US/Central



FIG. 7

00922210 000301


OpenFile 2
Release 2.0 - By Sam Samuels

New Client

Form Setup

Client's Region	<input type="text" value="United States"/>
Billing Address	<input checked="" type="radio"/> Same as Main Address <input type="radio"/> Different from Main Address
Billing Recipient	<input checked="" type="radio"/> No <input type="radio"/> Yes
Multiple Matters Anticipated?	<input checked="" type="radio"/> Multiple <input type="radio"/> Single
Engagement Letter	<input checked="" type="radio"/> Standard <input type="radio"/> Non-Standard <input type="radio"/> Engagement letter waived (Client was sent letter confirming scope of work we are undertaking)
<input checked="" type="radio"/> Standard billing arrangement. Billed monthly at full hourly rate plus expenses at regular rates. Invoices are to be paid monthly by client. A retainer was requested from the client.	
<input type="radio"/> Non-Standard billing arrangement.	
<input type="button" value="Setup Form"/>	




FIG. 8

New Matter

Setup Form Again

New Matter Information

Client # 103569
Client Name Residential Funding
Matter Long Name
Matter Short Name
(Up to 25 characters)

Billing Information

Opening Attorney

Billing Attorney

Responsible Attorney
(must be in the practice area performing the service)

Assigned Attorney

None None None None

Office

Department

Austin Office

Bankruptcy

Matter Type

Acquisition

Originating Credits

percentage (must equal 100%)

None 100

None

None

None

Billing Address

Address Line 1

Address Line 2

Address Line 3

Address Line 4

City:

State: Texas

Zip:

Billing Recipient (attention line to be on invoice)

Name

Title

Collection Contact

Name

Title

Telephone No.

Created by Refikar, Iva on Monday, July 30, 2001 16:44:51 US/Central

Comments to Billing Manager

Submit this Form

FIG. 9



OpenFile 2

Version 2.2 - My First Software

New Matter

Form Setup

Client's Region:	United States <input checked="" type="checkbox"/>
Billing Address:	<input checked="" type="radio"/> Same as Client Billing Address <input type="radio"/> Different from Client Billing Address
Is Client:	<input checked="" type="radio"/> A Bank <input type="radio"/> An Insurance Co. <input type="radio"/> Neither
Billing Recipient:	<input checked="" type="radio"/> Same as Client Billing Recipient <input type="radio"/> Different from Client Billing Recipient
Collection Contact:	<input checked="" type="radio"/> Same as Client Collection Contact <input type="radio"/> Different from Client Collection Contact
<input checked="" type="radio"/> Standard billing arrangement: Billed monthly at full hourly rates plus expenses at regular rates. Invoices are to be paid monthly by client.	
<input type="radio"/> Non-Standard billing arrangement, but same as previously approved for client setup.	
<input type="radio"/> Non-Standard billing arrangement.	

Setup Form



FIG. 10

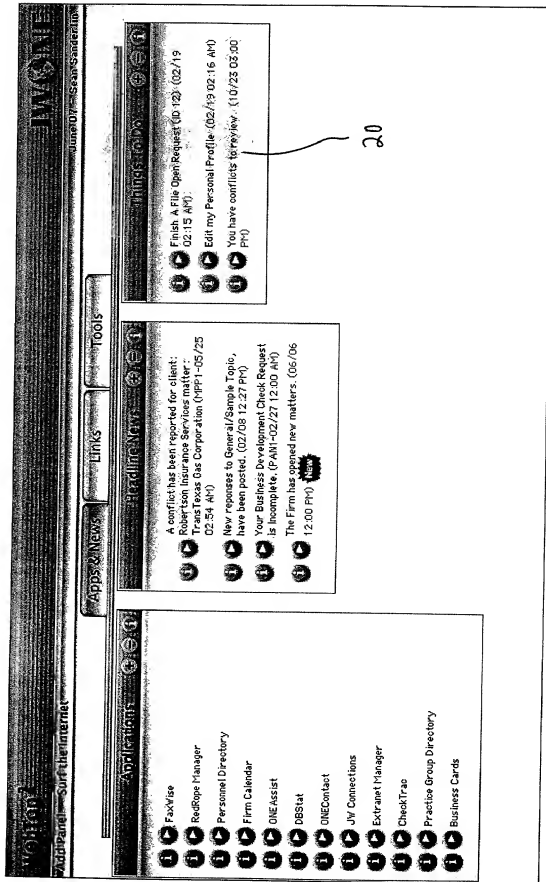


FIG. 11



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Attorney Conflicts Review

Conflict	Client	Parties	Regarding	Report To
→ 1	Southern Music Company	Tom C. Rhodes Jonathan Gurwitz RBC Music Company Southern Music Company	Copyright Infringement	Miller, Mark H.
		Adverse Owner Infringer Adverse Claimant Client		

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NOTICE: By clicking "Submit This Form", you are affirming to the Partnership that you have read the above and have communicated your knowledge of any conflicts. If your affirmation is found to be untrue, the last 15 minutes of "Bravcheat" will seem like Sunday dinner at granny's house.

> Submit This Form



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FIG. 12

T0E09D" 01222660



* Requires T-1-400 Series Interface

Attorney Conflicts Review

Conflict	Client	Parties	Regarding	Report To
1	Southern Music Company	Tom C. Rhodes	Adverse	Miller, Mark H.
		Jonathan Garwitz	Client	
		RBC Music Company	Adverse	
		Southern Music Company	Client	
		Claimant	Client	

NOTICE: By clicking "Submit This Form", you are affirming to the Partnership that you have read the above and have communicated your knowledge of any conflicts. If your affirmation is found to be untrue, the last 15 minutes of "Braveheart" will seem like Sunday dinner at

granny's house.

Submit This Form

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FIG. 13



Conflicts Of Interest Comments

You have marked the following as representing a conflict of interest:

Conflict ID: 26556
Client: Bank of America, N.A.
Matter: Ronald G. and Sanra Landry
Regarding: Mortgage Loan
Report To: Taylor, Tim
Comment:

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↙



> **Submit This Form**

← 28



FIG. 14

[illegible]

Conflicts Status Review

[Print All Conflicts](#) [Reset A Conflict](#)

Blank - Dallas

Table of contents

Saves		Conflict ID	Client Status	Matter Status	Client	Regarding	Report	Approved	Disapproved	Report	City
Leave Blank	❏	22517	EXISTING	NO	MCANY TECHNOLOGIES INC.	Personal litigation	LAVIN, Kathleen	629	2		Dallas
Leave Blank	❏	22566	NO	NO	Jay and Juliana Lopez	process various estate planning documents	Karbach, Michael	458	0		Office
Leave Blank	❏	22035	EXISTING	NO	Thisspark Corporation	Collection Matter	Judge, Jeremy L.	627	0		Office
Leave Blank	❏	22559	YES	NO	Promer Telecom, LLC	By grant, LLC, general	Horn, Jeff J.	538	0		Dallas
Leave Blank	❏	22310	NO	NO	John Phelps	journalist broker litigation	Perkins, W. Ross	589	0		Dallas
Leave Blank	❏	22294	EXISTING	NO	Computer Associates Int'l	Privacy right	Henderson, Robert F.	583	2		Office
Leave Blank	❏	22256	YES	NO	The Bureau of Motor Manual Vehicles	Trademark	Frederick, Charles	601	0		Dallas
Leave Blank	❏	22268	NO	NO	Maxson Financial Group,	defunct company and seek money back	Edman, Bob	615	0		Office
Leave Blank	❏	22031	NO	NO	Dr. Adamant James	to vacate default judgment	Washington, David K.	566	0		Office
Leave Blank	❏	22045	NO	NO	Stacy Costantini	Asset Purchase and Lease Negotiations	McGowan, James	545	0		Dallas
Leave Blank	❏	22025	EXISTING	NO	The Great Outdoors Grill Co.,	Corporate governance/ Personal and trademark infringement matter	Boyd, Cram D.	563	0		Office

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FIG. 15